GENTLETOOLS / FREE RESOURCE SERIES

BUSINESS / 8 PAGE EDITION

Freelance Scope of Work Template PDF

Translate a client request into deliverables, approvals, milestones and controlled change requests.

NOT JUST AN EMPTY FORM

A useful scope record states exactly what will be delivered, what is excluded and how extra revisions are approved. That clarity makes estimates and client communication more practical.

THE FOUR-STEP WORKFLOW

1. **Define what is known**
2. **Track actual events and evidence**
3. **Compare before deciding**
4. **Assign the next concrete action**

Record label

Record keeper / reference

- [ ] Separate estimates and verified facts
- [ ] Keep sensitive data secure

No login or email gate. Information you enter stays in the PDF.

FREELANCE DELIVERABLE CHANGE CHECK

Build the baseline

Write facts and sources before filling the main table. Do not guess at missing information.

Project or subject

Date or period

STEP 1 Write the intended outcome, deliverables, exclusions and required client inputs.

STEP 2 Track dated milestones, responsibilities, approvals and requested changes.

STEP 3 Agree acceptance criteria and document extra work before treating it as included.

STEP 4 Which fact or document still needs checking?

FREELANCE DELIVERABLE CHANGE CHECK

Keep a dated record

Record what actually occurred. Reprint this page whenever you need more rows.

Reference period

Review date

DELIVERABLE / CHANGE	SCOPED HOURS	USED HOURS	APPROVAL	EXCLUSION OR SCOPE SOURCE

Outstanding question or record to confirm

FREELANCE DELIVERABLE CHANGE CHECK

Keep a dated record

Record what actually occurred. Reprint this page whenever you need more rows.

Reference period

Review date

DELIVERABLE / CHANGE	SCOPED HOURS	USED HOURS	APPROVAL	EXCLUSION OR SCOPE SOURCE

Outstanding question or record to confirm

FREELANCE DELIVERABLE CHANGE CHECK

Compare with evidence

WHAT THIS DOCUMENT HELPS WITH

A useful scope record states exactly what will be delivered, what is excluded and how extra revisions are approved. That clarity makes estimates and client communication more practical.

1. Current facts

CURRENT	OPTION	EVIDENCE

2. Alternative course

CURRENT	OPTION	EVIDENCE

3. Uncertain information

CURRENT	OPTION	EVIDENCE

Working conclusion or question

Review by

FREELANCE DELIVERABLE CHANGE CHECK

Make the next step happen

Each useful action has an owner, a date and a result that can be checked.

ACTION 1 Write the intended outcome, deliverables, exclusions and required client inputs.

Concrete next action

Owner / due

ACTION 2 Track dated milestones, responsibilities, approvals and requested changes.

Concrete next action

Owner / due

ACTION 3 Agree acceptance criteria and document extra work before treating it as included.

Concrete next action

Owner / due

IMPORTANT CONTEXT

This is a project planning aid, not a signed contract or tax document. Verify payment, copyright, confidentiality and legal terms in your agreement.

- [ ] Source checked
- [ ] Next action assigned

FREELANCE DELIVERABLE CHANGE CHECK

Review a worked example

FICTIONAL EXAMPLE

Fictional example: a four-page site design includes desktop and mobile layouts plus two feedback rounds. Copywriting is excluded; a fifth page requires a separately approved quote.

BEFORE YOU RELY ON YOUR RECORDS

- [ ] Facts distinguished from estimates
- [ ] Dates, units and totals checked
- [ ] Source evidence saved separately
- [ ] Private identifiers protected

What will be improved next time?

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FREELANCE DELIVERABLE CHANGE CHECK

Deliverable acceptance

This page is tailored to the topic. Use it to check key items before closing your file.

AREA	AGREED SCOPE	EVIDENCE / CHANGE
Deliverables		
Exclusions		
Client inputs		
Revision rounds		
Change approval		

One additional item to check